



Commentary

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## After the Aramco Attack: A Middle East One Step Closer to Its “1914 Moment”

*On 14 September, strikes of uncertain provenance hit Saudi Arabia’s largest oil facilities, taking some 50 per cent of the kingdom’s oil production temporarily offline. Crisis Group offers a 360-degree view of the attacks and their implications for Middle Eastern and international peace and security.*

For much of 2019, Crisis Group has warned that a trigger event could spark direct military confrontation between the U.S. and Saudi Arabia, on one side, and Iran on the other, precipitating a regional conflagration. The combination of the U.S. “maximum pressure” campaign against Iran, Iranian pushback, the spiralling civil war in Yemen and the paucity of de-escalation channels available to the rival actors has primed the region for such an outcome, even if neither side wants it. Now more than ever, cooler heads are needed to lower the temperature, break the escalatory cycle and chart a diplomatic off-ramp.

The exact nature and provenance of the attacks remains disputed. What is certain is that a series of aerial attacks on oil facilities in Abqaiq and Khurais, both in Saudi Arabia’s Eastern Province and operated by the state oil firm Aramco, shut off around 50 per cent of the kingdom’s oil production. Yemen’s Huthi movement, which has been locked in a war with Yemeni opponents and their Saudi-led backers since 2015, immediately claimed responsibility. The U.S. promptly dismissed Huthi claims as unfounded and pointed the finger at Tehran, saying at first the attacks emanated from either Iraq or Iran and later that they came from

southern Iran. Riyadh also blames Tehran for being behind the strikes, but is more circumspect about who launched them and from whose territory, saying it is still investigating. Baghdad says its territory was not used. For its part, Tehran denies any involvement, accusing the Saudis and the U.S. of “maximum deceit”. It has threatened massive retaliation should it be attacked.

If credible evidence shows that the attacks originated in Iranian territory, it would mark a stark departure from Tehran’s strategy of pushback through proxies and plausible deniability. It would also almost certainly make de-escalation more challenging. Regardless, in many ways the die is cast. For the U.S. and its allies, this incident is an attack by Iran upon the heart of the Saudi and global oil infrastructure. They face a dilemma of whether and how to respond, given the risk of starting a chain reaction that puts the Gulf at the forefront of targets for counterattack and sets the region on fire, potentially drawing in Yemen, Iraq, Syria, Lebanon and Israel.

As adversaries regroup and consider their next move, Crisis Group experts discuss the reactions to the Aramco attacks and the attendant risks: Iran – by Ali Vaez and Naysan Rafati; Iraq – by Maria Fantappie; Gulf – by Elizabeth Dickinson; Yemen – by Peter Salisbury; United States – by Daniel Schneiderman; Israel – by Ofer Zalberg.

## Iran

Iran denies U.S. claims that it was behind the attacks, which it frames instead as a legitimate response by the Yemeni people to Saudi Arabia's role in the Yemen war. On 16 September, President Hassan Rouhani contended that "the Yemeni people have to respond to ... many acts of aggression and [arms] coming from the U.S. and Europe to Saudi Arabia and the UAE". Yet, even if the Huthis were behind the strike (which many military experts find implausible), it cannot be viewed in isolation and as a purely Yemeni affair. In light of heightened tensions between Iran and the U.S. in recent months, including a string of incidents targeting oil tankers in and around the Strait of Hormuz, as well as Tehran's support for the Huthis in their war against Yemeni foes backed by the Saudi-led coalition, the question may be not whether Iran was involved but how.

Over the years, Iran has cultivated a network of allies across the region through which it can expand its influence and deter its adversaries, all the while maintaining a degree of plausible deniability. If it did in fact launch the attacks from its own territory, it would constitute a departure from its long-established modus operandi. Such a shift would certainly require approval by the highest levels of Iranian leadership. It could indicate either that 1) Tehran does

not fear a robust response from either the U.S. or its Gulf allies, given Trump's obvious reluctance to start a military confrontation and Saudi Arabia's inability to sustain one; or 2) Tehran has concluded that it is worth taking the risk of a military retaliation given that, faced with considerable economic pressure, it increasingly has less to lose and perhaps something to gain from a short-term escalation that sets the stage for negotiations on different terms. Tehran may view Trump as a "Twitter tiger" and consider a limited U.S. military response to be a manageable circumstance that would add urgency to French-led efforts to find a diplomatic off-ramp. It probably deems additional sanctions as an equally manageable eventuality, since Washington has already blacklisted most of its industries and circuits of commerce. Of course, this calculus could backfire if it ends up pushing the Europeans closer to the U.S. position.

Whether Iran facilitated the attack (for example, by providing the weapons or technology for it to the Huthis and/or opposition groups in Saudi Arabia's Eastern Province, where the attacks took place), or pulled the trigger itself, it would have been motivated by the perception that Riyadh is a key accomplice – and a more vulnerable one – in the "maximum pressure" campaign, which has severely



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damaged the Iranian economy. By hitting the refineries, it hopes to force the U.S. to step back from this campaign lest continued chaos trigger a substantial rise in oil prices with economic repercussions in the U.S. as the 2020 presidential election draws near. Moreover, in Iran's eyes, targeting Saudi Arabia's energy infrastructure is an analogue to the U.S. strangling Iran's oil exports.

In the event of retaliation on its territory, Iran has indicated that it will counter-attack

disproportionately, either on its own or by encouraging attacks by its partners (such as Hizbollah) against U.S. and allied forces and assets in the region. This eventuality, in turn, risks a wider regional escalation that could draw in Israel, Iraq, Lebanon and Yemen. Iran could also accelerate and expand its breaches of the 2015 nuclear deal as another way of gaining leverage if and when the sides decide to negotiate.

## Iraq

The Iraqi government strongly denies that its territory was used as a staging ground. The force of its denials reflects its worries: the Aramco attacks are the latest, and most dramatic, in a series of strikes that have threatened to make Iraq ground zero for a proxy conflict. Since June, several unclaimed attacks have targeted U.S. installations in the country; in May, the U.S. asserted (and the Iraqi government denied) that a less damaging drone attack on Saudi Arabian oil facilities, similarly claimed by the Huthis, originated on Iraqi soil. Military facilities operated by Iran's Islamic Revolutionary Guard Corps and pro-Iranian paramilitary

groups have also been targeted in what are widely assumed to be Israeli aerial attacks. Pro-Iranian Iraqi groups have accused the U.S. of collusion with Israel and are pushing again to pass a law that would force the U.S. to withdraw its troops from Iraq; some have even threatened direct retaliation against U.S. assets in Iraq.

The U.S. has walked back its initial claim that the Aramco attacks may have been launched from Iraqi territory, saying instead that evidence points to southern Iran. Still, political pressure on Iraq from both the U.S. and Iran is likely to grow in the attacks' wake. Washington probably will push Baghdad even harder to fall in line against Tehran, rein in paramilitaries and reorient its trade away from Iran in line with U.S. sanctions. Pro-Iranian groups will respond by increasing their agitation against the U.S. presence, backing Prime Minister Adel Abdel-Mahdi's government into a corner and perhaps even forcing its resignation. If the U.S. and its allies launch a retaliatory attack against Iran, pro-Iranian forces in Iraq almost certainly will respond, increasing the likelihood of a U.S.-Iranian confrontation on Iraqi soil. If that happens, Iraq will move deeper into Iran's sphere of influence, and the political and economic rapprochement between Iraq and its Gulf neighbours that has gradually developed over the past two years will crash to a halt.



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Maria Fantappie, Senior Adviser on Iraq, contributed this section.

## The Gulf Arab states

So far, Saudi Arabia's response to the Aramco attacks has been both angry and calibrated, leaving a narrow off-ramp to avoid further escalation. The Saudis have clearly attributed the damage to "Iranian weapons", assigned ultimate culpability to Tehran and unleashed a full-throated attack on Iran in the local press. On 18 September, the defence ministry announced that Saudi Arabia will join U.S.-led patrols of Gulf waters to deter additional tanker incidents. Yet Saudi officials have also declined to say who precisely they believe pulled the trigger and from where. Prior to the attack, Riyadh had said publicly and in private conversations that it wanted to avoid military confrontation with Iran; it appears to be maintaining this stance at least before knowing whether and to what extent the U.S. would have its back. The Saudi foreign ministry on 16 September indicated that it will invite "international experts to view the situation on the ground" and join in the kingdom's own investigation. The inquiry buys time for tempers to cool and may give Riyadh (together with the U.S.) a better menu of options than it now has. If international investigators finger Iran, the U.S. accusation will be more credible. Riyadh could then react – whether militarily (with U.S. support), diplomatically or in both ways – with greater international legitimacy. The kingdom, along with the UAE, also has been requesting increased U.S. air defence support in light of the evident failure to stop this attack.

Ultimately, Riyadh likely will feel compelled to undertake some response, and is in consultation with Washington about what might be done – overtly, covertly, militarily or otherwise. The attack's sophistication shocked not only Saudi officials but also world oil markets; engineers who know the site say the damage at Abqaiq indicates that the attackers knew exactly where to hit. That the kingdom's conventional defences, including its U.S.-supplied Patriot missiles, were unable to prevent an attack of this magnitude will be a concern to other Gulf

monarchies, as well as to international business. If the region's most heavily fortified country couldn't stop attacks on its economic arteries, critical infrastructure in the smaller states appears even more vulnerable. Riyadh is concerned that the absence of a robust response will invite future attacks.

There is also a risk that the attacks will nudge Saudi views of the conflict in Yemen in a more hawkish direction. Policymakers in Riyadh increasingly think that the Huthi rebels have potential to become a long-term asymmetric threat to the kingdom's military and civilian infrastructure. Even if the Huthis didn't launch the 14 September strikes, their claim of responsibility indicates a willingness to hit such targets. Riyadh has very limited options to push back against this perceived threat and, absent other tools, may escalate its already devastating airstrikes and blockades in Huthi-controlled areas of Yemen.

In the absence of a U.S. military response, and in the wake of an international investigation pinning blame on Iran, a Saudi off-ramp could take the form of a combination of building a diplomatic coalition, engaging in covert action (in tandem with Washington) and beefing up its defensive posture. The kingdom could deploy



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more Patriot missile batteries or other defensive systems with U.S. assistance, to guard the Eastern Province, in particular its oil facilities.

More broadly, Saudi Arabia – along with the UAE – will be looking to the U.S. reaction as a barometer of where Washington is headed and how much the Gulf monarchies can rely on its protection in the future. There is a sense among both Gulf leaderships that such protection is

now in doubt – scepticism that began under Barack Obama’s presidency but has continued under Trump’s. Should it become convinced that U.S. protection is eroding, Riyadh, like Abu Dhabi, may come around to the view that while Iran is fundamentally hostile and aggressive, economic pressure coupled with pragmatic efforts at de-escalation is the best way to safeguard its security.

## Yemen

From the very beginning, Yemen’s Huthi movement (who call themselves Ansar Allah) has claimed responsibility for the attacks on Khurais and Abqaiq. The group justifies these attacks as a response to what it describes as Saudi Arabia’s siege of Yemen by land, air and sea, as well as four and a half years of Saudi-led bombardment that have caused thousands of civilian casualties and massive destruction. They reject U.S. claims that they lack the technical sophistication required to launch such an operation, pointing to the long-range drones they unveiled earlier this year, which they say are home-made.

Senior Huthi leaders have threatened for some time to launch more effective and sophisticated assaults on Saudi Arabia’s oil and transport infrastructure. They say attacks will

continue until the Saudis agree to direct talks with them and the Sanaa-based government and to mutual de-escalation. They accuse the internationally recognised government of Abed Rabbo Mansour Hadi of being little more than a front for Saudi and U.S. interests that is hence unable to negotiate a settlement of Yemen’s war. They may now be tempted to launch a strike that clearly originates from Yemen in an attempt to show that they have the capacity to hit deep in Saudi Arabia and with accuracy. Some in the movement believe a regional conflagration would work to their advantage, drawing Saudi and U.S. attention away from the war in Yemen and giving Saudi Arabia reason to quickly end the war on its southern flank so that it can focus on other fronts. Yet many others want to avoid this outcome, not least because they worry it could bring new levels of destruction.

The Huthis’ Yemeni critics say it is the northern rebels who are a front for external interests, namely the Islamic Republic’s, pointing to their immediate claim of responsibility for the attacks as proof of close coordination between the movement and its purported Iranian handlers.

Regardless of the provenance of the attacks, the risks for Yemen are clear. Crisis Group has warned repeatedly that absent a wide-ranging political process, including direct Huthi-Saudi talks aimed at de-escalating cross-border attacks and opening political space for intra-Yemeni discussions, Yemen will become more deeply enmeshed in the regional Cold War and



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become either a trigger for a regional hot war or the target of a U.S. attempt to strike at a symbol of Iranian expansionism. Military escalation on the part of the U.S. or its allies in Yemen would

likely prove counterproductive, intensifying and lengthening the civil war to the detriment of Yemeni and Saudi Arabian civilians alike, and to any hope of a stable region.

## United States

In the attacks' immediate aftermath, the Trump administration's public posture has bounced back and forth with whiplash-inducing speed. Secretary of State Mike Pompeo quickly blamed Iran for the attack and said the U.S. would make sure the Islamic Republic was "held accountable for its aggression". President Donald Trump said the U.S. was "locked and loaded", ready to act against the presumed culprit pending a go-ahead from Saudi Arabia. He also reversed his widely reported willingness to meet with Iranian leaders without preconditions. The next day, however, Trump moderated his rhetoric, saying the U.S. didn't want a war and had promised the Saudis nothing in that regard. The conflicting messages may indicate competing instincts: is it better to look tough on Iran, as U.S. politicians have almost reflexively done since 1979, or to avoid further military entanglement in the Middle East, as vocal parts of his base demand and as he has consistently vowed? Trump's 18 September call for new sanctions on Iran should be seen in this light: a middle path of sorts, falling short of military action while dispelling the perception of doing nothing.

Deciphering Trump's further intentions is an imprecise science at best: it seems likely that the president himself does not yet know what he will do. For the moment, the U.S. strategic calculus is also in flux. On the one hand, Washington has a longstanding commitment to the free flow of Gulf oil, which the attacks interrupted, and the Trump administration has repeatedly doubled down on its special relationship with Saudi Arabia despite the horrors of the Yemen war and the murder of journalist Jamal Khashoggi, a U.S. resident, in a Saudi consulate. These matters must weigh on Trump as Pompeo returns from his visits to Saudi

Arabia and the UAE, where he took the measure of the Gulf monarchies' thinking.

On the other hand, the Pentagon is reportedly averse to military action. The attacks have also renewed the Capitol Hill debate, which began earlier this year, about how to constrain the White House vis-à-vis Iran, in particular how to stop it from waging an unauthorised war. A number of Democrats in the House and Senate have publicly opposed U.S. retaliation. Influential Republicans, like Senate Majority Leader Mitch McConnell, have called for imposing consequences on Iran, but thus far the usual Washington hawks are quieter than one might expect. U.S. officials at the UN similarly spoke of consequences, but when asked, had no answer for what these might be. Whether and how the uncovering of evidence that clearly indicates Iranian culpability might affect the debate remains to be seen.

For now, Pompeo seemed to indicate on the plane back from the Gulf that no military response is imminent. "We'd like a peaceful



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resolution, indeed. ... I was here in an act of diplomacy”. That does not mean the absence of any reaction – one can assume that covert action and cyberattacks, at a minimum, are

highly possible, as is an effort at the forthcoming UN General Assembly to muster broad international opposition to Iran.

## Israel

Absorbed by their 17 September national elections, Israeli leaders have thus far kept mum publicly regarding the Aramco attacks. In private, however, they say Iran is behind the strikes. There is consensus among Israeli officials that Iranian hawks felt they needed to change the facts on the ground in order to avoid the possibility of renewed negotiations under

heavy sanctions, which could have resulted in Iran acquiescing to an unfavourable agreement. Iranian leaders felt it was safer to be assertive, the logic goes, having seen that President Trump is keen to avoid war, as evidenced by his aborted plan to attack Iran in June for fear of escalation and his firing of John Bolton (a clear hawk when it came to Iran), from his job as U.S. national security advisor.

From the Israeli government’s perspective, credible deterrence against Iran is at stake. Iran purportedly attacked a key U.S. ally, blatantly violating its sovereignty and harming U.S. and global energy supplies. Israeli officials make clear that a similar Iranian attack on Israel’s maritime gas rigs or strategic fuel depots would prompt a forceful Israeli military response. They are frustrated by Saudi Arabia’s and Trump’s restraint thus far.

Worse, Iran (or its allies) seems to have used high-precision missiles with great efficacy. In Israel’s view, Tehran has been working hard to establish such offensive capacities in Lebanon and Syria. In this environment, demonstrating to Iran that such attacks come with high costs is a core Israeli priority.



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## Conclusion

The risk of a major regional conflict that spans the region from Iran to the Arabian Peninsula to the Mediterranean by way of Iraq, Syria and Israel is arguably the highest it has been in years. The Aramco strikes were no minor incident: they were perhaps the most significant attacks on Saudi Arabian infrastructure in modern history, and the result of a series of provocations and tit-for-tat exchanges that have been allowed to gather momentum for too long. At

this point, a single misstep could set off a chain reaction – a “1914 moment” for the Middle East – that would be difficult to control.

The U.S. and its allies may well decide that they need to respond to restore deterrence. Different such responses can be imagined: a direct attack on Iran; attacks on Iranian proxies; covert attacks in Iran; cyber-attacks against Iranian assets; and so on. But the key is to understand how we have reached such an explosive

situation and what can be done to walk back from the brink. As Crisis Group has warned for some time, a U.S. strategy of withdrawing from the nuclear deal and seeking to devastate Iran economically was bound to provoke Tehran and prompt reaction on the nuclear and regional files. That is precisely what has come to pass.

A U.S.-Iranian de-escalation plan is already available. Paris has proposed a series of steps to Washington and Tehran that it hopes will pull the Iranians back into compliance with the nuclear deal in exchange for financial relief in the form of new U.S. oil export waivers; halt further provocations from all sides; and lay the groundwork for wider talks on a regional détente. U.S. officials may see the French proposal as moot, given the scale of the attacks on the Aramco facilities, but the cost of further regional escalation is compelling reason to reconsider.

Reinvigorated diplomacy is also needed at the sub-regional level, particularly in Yemen. Huthi officials say they want to speak with Saudi Arabia to reach a de-escalation agreement and that they are willing to find an intra-Yemeni solution to the country's civil war. There are many reasons, after years of fighting, why Saudi Arabia and its Yemeni allies do not

trust these promises. But there are now years of evidence that the alternative to negotiations is counterproductive. The Huthis are drawing closer to Iran and developing more sophisticated weapons, which they are using to threaten their Gulf neighbours, all the while developing an iron grip on the north. The cold fact is that the war is making Yemen and the region less safe. As such, there is every reason for Saudi Arabia to take Yemen off the table as a battleground for a regional confrontation.

This course of action is possible, but will require a shift in approach on both sides. The Huthis have long believed that escalation against Saudi Arabia will bring the kingdom to the negotiating table; Saudi Arabia has long held the view that war and economic pressure will bring the Huthis to heel. Both strategies have failed. The two sides need to talk directly with each other and take advantage of the UN process in place under Special Envoy Martin Griffiths to find ways to resolve Yemen's internal issues.